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MANUAL FOR HISTORICAL WORK

PENNSYLVANIA HISTORICAL COMMISSION

HARRISBURG
1940

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Compiled and written
As a Pennsylvania WPA Project

F. P. Harrington, Commissioner

Philip Mathews
State Administrator

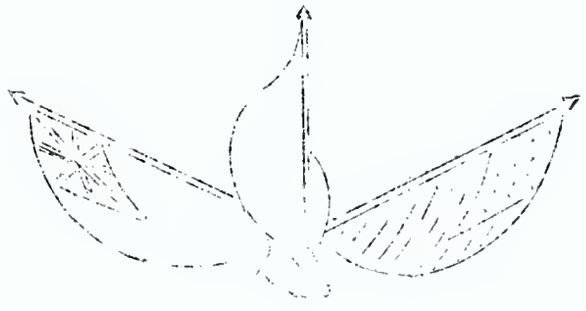
MANUAL FOR HISTORICAL WORK

FEDERAL WORKS AGENCY
WORK PROJECTS ADMINISTRATION
O. P. 665-23-3-596 W. P. 21010
FRONTIER FORTS AND TRAILS SURVEY

A project sponsored by

THE PENNSYLVANIA HISTORICAL COMMISSION

Old Customs House
Erie, Pennsylvania
October 1939



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I. INTRODUCTION.

The Frontier Forts and Trails Survey is now engaged in bringing to light the historic past of northwestern Pennsylvania. This project of the Work Projects Administration, under the sponsorship of the Pennsylvania Historical Commission, is gathering together the historical records of this region. In the libraries and from private collections, research workers are transcribing important source material, while a careful study of all the historical works about this section is being made. This research is supplemented by the work of photographers, artists, and draftsmen.

In an earlier phase of the project, archaeologists excavated various Indian sites, and the site of Fort Le Boeuf; while an engineering crew surveyed the Erie county section of the Old French Trail that ran from Fort Presque Isle on Lake Erie to Fort Machault at the junction of French Creek with the Allegheny River. In this way, valuable material evidence was obtained for this historical endeavor.

Complete transcripts or copies are made of important sources for the history of the region. Collections from which some valuable material has already been obtained, include the Bouquet correspondence and the National Archives of France. The French material has to be translated.

Subject notes are used to record the facts gathered from secondary historical works. They make up a note system similar to that used by many leading historians. Historical works and articles are read, and from them facts about northwestern Pennsylvania are copied on 3 x 5 cards. The general rule in making these subject notes is to have only one idea, fact, or statement on a card. These cards are then filed in such a way that all the cards on a given topic of the regional history are close together, with guide cards forming a running topical outline to the work. A student making use of these files will find it easy to compare and criticize the statements of various writers. This system is so flexible that very little rearrangement is necessary when new material is found, for the new cards are merely inserted with others of a related topic.

A bibliographical file and transcript list file supplement the files of transcripts and subject notes. They are intended to give a complete list of all the printed and manuscript sources of information. Thousands of cards are already on file. All the books, articles, documents and other materials that may supply information on northwestern Pennsylvania history are listed in the bibliographical file. The transcript list shows all the transcripts of letters, documents, and articles that have been made.

The transcript list is the basis for the transcript catalogue, which summarises the contents of each transcript. There are also card catalogues for photographs, maps, lantern slides, and museum items.

The subject notes and the transcripts are cross-indexed by the names of persons and places, and by dates.

Identification cards are used to describe, identify, and define persons, places and unusual words mentioned in the transcripts. This may be called a "dictionary of names."

All this work implies the preparation of material for publication. Important letters and documents are being arranged and edited for publication as sourcebooks. Two French journals have been translated and edited. Reports, in the form of histories of the various periods of northwestern Pennsylvania history are also planned. A brief, popular account of the region's history, called NORTHWESTERN PENNSYLVANIA UNDER THREE FLAGS, is now being written.

If the worker will study and follow the instructions, and model his work after the examples which are given, he will have no difficulty in adapting himself to the work of the Frontier Forts and Trails Survey.

October, 1939.

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II. MANUSCRIPTS.

1. Primary and Secondary Materials.

Primary (or original) source material consists of contemporary documents, letters, newspaper accounts, books and other records, written near the time of the events which they describe. They represent first-hand evidence. Secondary works, on the contrary, are historical works which should be based on primary material, but which interpret the facts at second-hand.

Christie's letter to Bouquet in July 1763, describing his surrender of Fort Presque Isle, is primary material; as is the report of the court martial, and the account given in Hante's History of the Late War. They were all written shortly after the event. But Parkman's account of it in The Conspiracy of Pontiac is secondary; Parkman obtained the facts from these and other sources.

The sources may be called the witnesses, while the secondary work selects, interprets and judges the facts which these sources contain. A given group of sources may be interpreted in different ways; that is the reason why it is important, in serious historical study, to consult the sources as well as the secondary historical works.

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https://archive.org/details/manualforhistori00unit

3. Making Transcripts.

Complete copies or transcripts are made of primary source material, and of secondary material which is more valuable as a whole than when broken up into subject notes. The original should be copied exactly as written, word for word, and letter for letter. The spelling, punctuation, capitalization, abbreviations, and grammar should be carefully reproduced. Errors in the original may be marked by a star (*), which serves to indicate that the transcriber is not responsible for the mistake. If there are numerous errors, do not use stars. Check the transcript very carefully, and at the bottom of each page add, in brackets:

}Spelling, punctuation, etc. as in original{

4. Headlines.

The headline is the name or title of the transcript. When copying printed material, the title will be found without difficulty. Manuscript material may give more trouble.

When transcribing an original letter, the name of the sender and the name of the person addressed should be printed in capitals immediately above its beginning, thus:

HENRY BOUQUET TO LEWIS CURRY.

MARQUIS DUQUESNE TO THE MINISTER.

In the case of an extract from a letter, the form is:

EXTRACT FROM LETTER, SIR WILLIAM JOHNSON TO HENRY BOUQUET.

For a manuscript document which is not a letter, a title may often be taken from the endorsement, written across the back when the original recipient filed it. The title may be merely a brief description. Examples:

ROYAL WARRANT.
PUBLIC ORDER.
REPORT ON FORT PITT AND POSTS DEPENDING BY HARRY GORDON.

When the writer or the recipient of a letter is unknown, leave a space in brackets:

{ } TO AMHERST.

But if from internal evidence you are reasonably certain of the name, write it within brackets:

{BOUQUET} TO AMHERST.

If a title is supplied in the original, use that as the headline. But if it lacks either the name of the sender or the recipient, supply the missing element in brackets, thus:

LETTER {FROM HENRY BOUQUET} TO SIR JEFF. AMHERST.

If an historical article, etc., the author's name is written first (if it is given), separated by a colon from the title, which is printed in small capitals, thus:

Louise Phelps Kellogg: CELORON DE BLAINVILLE.

The author's name is not reversed in this case, because it would have an awkward appearance.

In the case of encyclopedia articles, the author's initials will usually be found at the end of the article. The author's full name can then be found in a list at the front or back of the volume.

4. Description.

The description is given in brackets below the headline. This includes information as to the location and origin of the transcribed material.

In the case of manuscripts or photostated manuscripts, there should first be a statement of the location, indicating the public institution or private collector in whose possession it is -- followed, if possible, by the description, volume, page or numerical designation by which it has been catalogued. Finally, there should be a statement whether the document is entirely by the author's hand, or written by a secretary and signed; or, if not an original letter actually sent, whether it is a draft or copy. When the writer, though he is not the author, is known, his name should be given in the description. The following symbols may be used:

A. L. S.	Autograph letter signed.
A. D. S.	Autograph document signed.
L. S.	Letter signed.
D. S.	Document signed.
A. N. S.	Autograph note signed.
A. N.	Autograph note.
Dft.	Draft.
A. Df.	Autograph draft.
Df. S.	Draft signed.
A. Df. S.	Autograph draft signed.
C.	Copy.

The following is an example; it includes the headline, for greater clarity.

CROGHAN TO STANWIX

[B. M., Add. MSS. 21655, f. 63, L. S. Handwriting of William Trent]

In this "B. M." stands for British Museum; "Add. MSS." for Additional Manuscripts; 21655 is the series number; "f." stands for folio (leaf), often used instead of page in numbering manuscripts; and the balance of the description means that Trent wrote the letter and Croghan signed it.

In the case of articles, extracts or selections taken from books, magazines, or newspapers, the description should include enough data to make it easy to locate the place from which it was taken. When articles, such as biographies, are taken from encyclopedias or dictionaries, the words "Article from" should precede the name of the book, thus:

[Article from Dictionary of American Biography, XI, 202]

Note: The name of a book, magazine, or newspaper is underlined. Roman numerals serve to indicate volumes; Arabic numerals indicate pages.

When a transcript consists of more than one sheet of paper an abbreviated version of the description should be written in the upper left hand margin of the succeeding sheets, to avoid loss.

When a long series of extracts is made from a file of newspapers, the descriptions may be carried in marginal notes, repeating the name of the newspaper, numbers, pages, columns, dates. Example:

Crawford Weekly Messenger Thurs. Nov. 13, 1806 Vol. II, No. 91, p. 2, Col. 2, 3, 4. Note that no brackets are used.	TO R. ALDEN, ESQUIRE MEADVILLE. ----- [Body of article]

The descriptions of articles taken from a magazine or a pamphlet series will use the following form:

[Western Reserve Historical Society Tracts, No. 32]

or [Penna. Mag. of History and Biography, X, 113-114. (1887)]

The description of transcripts from historical material quoted in books is similar, but the name of the author, editor or compiler, if known, should be given, as well as the place and date of publication.

Example: [J. D. Smith, Colonial Frontier (N. Y., 1923), II, 122]

-author- -title- - place of publication - date - vol.-page.

5. Date.

If a place and date appear at the beginning of a letter or document, they should be copied in the form used in the manuscript or original. But if the place and date appear at the end of the letter, or in an endorsement, they should be repeated at the beginning within square brackets. The same thing should be done if the date is obtained from another source. If there is any doubt, it should be followed by a question mark. If a date is only approximate, prefix the abbreviation c. (circa, Latin for "about".)

6. The Text.

Headline, description, and date should all be written before beginning on the text or body of the item. The original must be copied exactly as written. All doubtful words should be traced, especially doubtful names. What appears to be misspelling may be a valuable indication of a former pronunciation. Drawings or sketches in the text should also be traced.

When a word cannot be read because of blurring, fading or other reason, leave a corresponding space in brackets. Example:
"His Majesty was pleased in [ ] last, to appoint you Lieutenant Governor of Montreal."

When from the sense of the passage, it is possible to fill in a word that is lost, the copyist may write it within brackets. This may be done even after the tracing of the doubtful word, but in such a case use a second line for the bracketed word. When the reading is uncertain, add a question mark. Examples:

a. When a word is completely lost:

"Having received no]letters, news[from you...

b. When a tracing can be made:

"Having received no $\overset{\text{]letters, news?[}}{\text{~~~~~~~~~~~~}}$ from you..."

Copy raised letters exactly as they are. Reproduce long s in the modern style. When a word or part of a word is repeated from the end of one page to the beginning of the second, omit the first version of it. Omit decorative flourishes. Follow the writer's practice with regard to paragraphs and capitals.

When a transcript covers more than one page in the original, the point where one page ends and another begins should be shown by skipping one line and writing the new page number in brackets on this line.

Signatures should be printed in capitals.

7. Address.

The name of the person to whom a letter is written will often be found either at the end of the first page of a letter or to the left of the signature. This corresponds in part to the inside address of modern business letters. If found at the end of the first page of the manuscript, it should be copied at the end of the first page of the ink transcript, and typed at the end of the first page of the typed transcript. In other words, it should be kept in the same relative position on the page, without regard to the text. When at the end of a letter, simply copy as it is.

The outside address, if there is one, should be copied at the end of the letter, preceded by the word "Addressed," in square brackets, thus:

]Addressed[To His Excellency Colonel Henry Bouquet commanding at Fort Pitt.

8. Endorsement.

The recipient of a letter or document would often note the name of the sender, dates, and comments in a convenient place on the back (or elsewhere). These should be copied, preceded by the word "Endorsed" in square brackets, thus:

]Endorsed[Sir Jeffery Amherst 3d August 1762.
Received the 25th. Octr

9. Footnotes.

When footnotes occur in material that is to be transcribed, they should be copied after the end of the original page is reached, drawing a line between the body of the text page and the beginning of the notes. The entire note should be indented a noticeable amount inside the margin of the text. Care should be taken to place the number of the note correctly in the body of the text.

When a long footnote carries over from one page to another, continue writing the footnote without a break, save for the page number in brackets. Draw another line at the end of each page's footnote (or footnotes). The footnotes will thus be marked off from the text by two lines and by indentation.

10. Listing.

As each individual transcript is completed, two transcript list cards should be prepared for it. One of these forms part of the permanent record of transcripts on file; the other is used for a work record. (See Chapter III for forms and explanations.)

No transcript list cards are made when printed calendars or catalogues are available. In such cases the worker will be notified.

11. Checking.

Ordinarily, each transcript should be checked by two persons, one reading the transcript while the other follows the original. Spell out all proper names and misspelled words, and call out all punctuation marks. This should be done both for the handwritten copy and the typed copy.

If one worker is checking, one line should be checked at a time, carefully reading both original and copy.

12. Initials and Date of Work.

Each transcript should bear the pencilled initials of the copyist and checkers in the lower left margin, as well as the date the work was done, thus:

$5 - \frac{15}{17} - 39$ ---- }date written{
---- }date checked{

$\frac{AB}{MN \quad YZ}$ ---- }copyist{
---- }checkers{

The typist's initials should be pencilled in the upper left hand corner.

13. Filing.

Individual transcripts are filed alphabetically according to authors in the general transcript file. If anonymous, they are filed by titles.

The transcripts from collections are filed in the same order and grouping as the original collection. This is usually a chronological arrangement. These special files are named for the original collections, as "Bouquet Correspondence", "Archives Nationales", "Horn Papers".

14. Accuracy.

The necessity for accuracy and carefulness in transcribing, typing and checking cannot be emphasized too much. One single error may discredit the whole work.

15. Example of Typical Transcript.

Headline — THOMAS BARNSLEY TO HENRY BOUQUET

Description — [B. M., Add. MSS. 21651, f. 64, A. L. S.]

Date — Fort Loudoun the 20th Novr 1764

Text — Dear Sir

Inclosed is a Letter I Received from Mr. Rutherford but as it is not in my power to answer it, have wrote him word so, and that I would forward it to you and....

I have the honour to be with Respect
Dear Sir
Your Most Humble and
Most Obedient Servant

Signature — THOS. BARNSLEY

Inside Address — Col. Bouquet

Endorsement — [Endorsed] Captain Barnsley 20 Novr. 1764
Received 26th at Fort Pitt

Address — [Addressed] To His Excellency Colonel Henry Bouquet commanding at Fort Pitt.

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III. BIBLIOGRAPHY

1. Use of Bibliographical Cards.

Bibliographical cards are used to identify, locate, and describe all the units of written or printed material from which historical information may be obtained. They are similar to the cards used in library catalogues. In connection with the survey's work, it is intended to list on such cards all the material that can be used for research on the history of northwestern Pennsylvania, telling where it may be found, and giving all the necessary information about it. These cards serve to expand the abbreviated references to sources and books on the transcripts and subject notes.

Before any document or book can be relied on, certain particulars must be known about it. There should be information regarding its authorship or origin; title or other description; form, whether book, article, copy, manuscript, or photostat; and place and date of origin. Research workers must know:

a. Who wrote it?

b. What is it?

c. What form or state is it in?

d. Under what circumstances was it produced?

2. Kinds of Bibliographical cards.

Cards referring to more general works such as books, magazines, newspapers, and collective works are called bibliography cards.

Cards referring to letters, documents, depositions, magazine and newspaper articles, and articles from books are called transcript list cards or transcript catalogue cards. They are all bibliographical cards, but the name "bibliography" is used in practice for the cards of a general nature. This is done to avoid using the lengthier term, general bibliographical card.

Transcript list cards and catalogue cards refer to transcripts that have been made, or will be made. The catalogue card has a summary of the transcript on the reverse side; but the faces of the cards are identical.

3. Sources of Bibliographical Information.

The file of bibliography cards and transcript list cards is built up in several ways. When work is begun in any library, the card catalogue and the shelves are searched for books and materials which have information about northwestern Pennsylvania history. The cards made for these books or materials are filed in the assignment bibliography file, which is a list of all the books and materials available for the assignment of work. There should be a continued effort to find more books and materials to add to this list.

Often a history, article, or essay will contain bibliographies or booklists, as well as footnotes showing other sources of information. Bibliography cards are made from these in the course of making transcripts or subject notes. They are of especial value if the historian describes or evaluates the book or source. In this case, the description is quoted on the reverse of the card, with a suitable reference. There are also various bibliographical lists which may be assigned. These cards are filed in the potential bibliography; they show materials that should be looked for. Cards are also made for each book or other unit, when the work of making notes or transcribing is completed. These are used for the final bibliography, showing what has been done.

4. The Face of Bibliography Cards.

The face of a bibliography card gives the information necessary to locate and identify the book or item. Transcript list cards are similar, but will be discussed in section 6.

For bibliography cards the necessary information includes the following, shown in the proper arrangement:

DIAGRAM

Name of author or editor Last name first	
	Title. underlined
Name of Library	No. of volumes, if more than one. Information regarding edition, and changes in name. Name of series, if part of series.
Call Number	Place of publication Publisher Date of publication.

If any part of this information is missing, space is left to include it, if it is found later. Similarly, when only initials are given for part of an author's name, space is left after each initial, and no periods are used. This permits the addition of the full name when it is found.

Example of bibliography card for a book:

Mackenzie, Alexander Slidell	
	The Life of Commodore Oliver Hazard Perry
	2 volumes
	Reprint of 5th edition, c. 1843
E.P.L. B- p 464 m	N. Y. A. L. Fowle 1900

The face of bibliography cards for magazines, newspapers, and other periodicals will usually lack the name of an editor, unless a magazine is very closely associated in the public mind with its editor. For the Crawford Weekly Messenger, which is clearly identified with its editor, his name would be placed in the upper left of the card, thus:

Atkinson, Thorn s, ed.

The publisher's name may also be omitted.

The usual form for cards on periodicals will be as follows:

Erie Dispatch Herald

combination of Erie Morning Dispatch and Erie Evening Herald

E. P. L.
Newspaper
Room

Erie, Pa.
Jan. 22, 1922 to date.

The face of cards for manuscript collections shows the name of the collection, a brief explanation of its nature, and its arrangement, and its owner or custodian. The titles of manuscript collections are not underlined. Example:

The Dobbins Papers

- The correspondence of Daniel and W. W. Dobbins.
- Four boxes, not fully catalogued.
- In Library of Buffalo Historical Society, Delaware Park, Buffalo, N. Y.

5. The Reverse of Bibliography Cards.

The reverse of a bibliography card is used to note information regarding the value of the book or item referred to. Here mention of the presence or absence of bibliography, index, maps, illustrations and number of pages in the book must also be made.*

When the first bibliography cards are made for books on the shelves of libraries, a brief description of each book's contents should be written on the reverse of each card. In the case of volumes of printed source material, the letters or documents which refer to the region should be listed on the reverse of the card for the volume. If there are only a few scattered items of importance in a lengthy work, page numbers should be given. Examples:

a. On the reverse of a card for The Sullivan-Clinton Campaign in 1779: Chronology and Selected Documents (Albany, 1929), the following would be noted:

> 216 pages, bibliography, index, maps.
> Includes: Essay on campaign, chronological history, selected letters and documents, journals not previously published.

b. On the reverse of a card for Pennsylvania Archives, Series 2, Volume II :

> 704 pages
> p. 442 Provincial Officers, 1754
> 443-5 Officers, 1755.
> 457-461 " , 1756.
> 465-468 " , 1757.
> 477-484 1a. Regiment
> 500 " " , 1759
> 531-532 Indian Traders
> 533-538 " "
> 628-629 Kayashuta's Passport
> 639-704 Col. Burd's Journal

* In using the reverse or back of a card, turn the card over, letting the left hand edge of the card become the top. This is the natural way for righthanded people.

When a bibliography card is made for a book or for material mentioned in the bibliography or footnotes of another book, the book which supplies the information for this card should be cited on its reverse, giving author, title, volume and page numbers. If any opinion is expressed about the book, or if information about its contents is given, a quotation should be made above this reference. For example, Thwaites in The French in America mentions Channing, Hart, and Turner, Guide to the Study and Reading of American History (Boston, 1912), as a useful help. The reverse of a card for the Guide, made from this reference, would look like this:

"Brief but serviceable."
Thwaites, French in America,
p. 290.

On the reverse of the bibliography card which is prepared after the completion of subject notes or transcripts from a particular book, there should be a brief summary or description of the book. This should be followed by the expression "Transcripts completed", if transcripts were made, or by "Subject notes completed", if subject notes were made. The number of transcripts or notes will be added at the office.

When all the information cannot be put on the back of one card, make another card with the face exactly like the first. On the back of the first card, write "continued on card 2" at the bottom. On the back of the second, write at the top, "continued from card 1." Follow the same idea for more than two cards.

6. Transcript List Cards.

There is essentially no difference between bibliography and transcript list cards, except that transcript list cards are made for units of written or printed material short enough -- or sufficiently important -- to be transcribed as a whole. The card made for a book or for a manuscript collection is a bibliography card; the cards made for pertinent letters, documents, articles, etc., printed in the book or included in the collection, are transcript list cards.

The arrangement is similar to that of general bibliography cards. The title of the item is, however, not underlined, but put in quotation marks, to avoid confusion with the underlined name of the book or printed collection. The titles of manuscript collections are not underlined.

Whenever possible, give the dates for the origin of primary sources, such as letters and documents. Below the date and preceded by the word "in," explain where the item was found. This corresponds to the description on the transcript. Filing information is added when the corresponding transcript is filed. The following diagram shows the arrangement.

DIAGRAM

Name of author of item, last name first.	
	"Title of item, in quotation marks."
	Date of item, if it is primary source material.
in:	Name of author or editor, followed by Name of Book or Collection.
Filing Information	(place, publisher, date of publication, for printed material) volume, series, page, or folio numbers.

Two transcript list cards should be made for each transcript, immediately after the completion of the transcript. One of these cards is used for a work record, and the other is added to the permanent record of transcripts on file. The initials of workers and dates of work on the transcript should be written in pencil on the back of the card intended for a work record.

Besides the transcript list cards made after completing transcripts, others will be made from footnote and bibliographical references to letters, documents, articles, etc. In such a case, the book which mentioned the item should be cited on the reverse, along with opinions or information, in the same way as for ordinary bibliography. These potential transcript list cards show more items to be looked for.

A typical transcript list card for an item from a book follows:

Ward, Edward

"E. Ward's Deposition," June 30, 1756.

TR in: Mary Carson Darlington, ed., History of Colonel Henry Bouquet... (privately printed, 1920), pp. 41-47.

A typical transcript list card for a manuscript item, using the example on page 9:

Barnsley, Thomas

"Thomas Barnsley to Henry Bouquet,"

SP Fort Loudoun, Nov. 20, 1764.

in: B. M., Add. MSS. 21651, f. 64, A. L. S.

7. Transcript Catalogue Cards.

A catalogue card is made for every transcript filed, by the cataloguers in the filing department. The face of the card is the same as for a transcript list card. On the reverse, however, there is written a description or summary of the contents of the transcripts. If more than one card is necessary, follow the same rule as for bibliography cards.

When printed calendars or catalogues are available, summaries may be quoted from them, with a reference to book, volume, and page. Care should be taken, however, to have a complete summary.

Example of transcript catalogue card:

FACE

Gordon, Harry

"Present State of Fort Pitt and Posts Depending," Dec, 24, 1760.

TR
PT in: Public Archives of Canada, Ottawa.

REVERSE

An official report giving detailed descriptions of Forts Pitt, Venango, Presque Isle, and Le Boeuf, with measurements.

8. Filing Information on Transcript Cards.

There are two separate transcript files, one for detached items, the other for items arranged according to collections, Some documents have been photographed. So that the transcript list card and transcript catalogue card will indicate where the corresponding transcript may be found, the following symbols are used:

TR -- for transcripts in the general file of detached items.

SP -- for transcripts filed by collections.

PT -- for photostats.

Examples of the use of these symbols will be found in sections 6 and 7. They are located halfway down the lefthand margin of the cards.

9. Bibliographical Files.

It will be apparent that there are several bibliographical files, each of which has its own distinctive use. To avoid confusions in the filing of the various types of bibliography cards and transcript list cards, an indication of their intended use is marked in pencil in the upper righthand corner, by the worker who has written the card:

A -- on cards made for materials available for assignment. (Assignment file.)

PO -- on cards made for materials to be looked for. (Potential files.)

F -- on cards for completed work. (Final files.)

All bibliography and transcript cards should be checked by the supervisor of the department where they have been made.

As a general rule, bibliography cards and transcript cards are filed alphabetically, according to authors (or titles, if anonymous.)

In the bibliography of materials available for assignment (assignment file), the cards are filed alphabetically, first, according to libraries having the books, and then according to authors. When work is assigned in a book, an X is marked in the upper righthand corner of the card. When finished, a line is drawn through the X, making it a star (✳). Occasionally, a transcript list card may be placed in this file, for an isolated item (not in a book or collection), which is available for work. In the end, this assignment will be a union catalogue of all the materials available for the study of northwestern Pennsylvania history.

Bibliography and transcript list cards on materials to be looked for are filed alphabetically in the potential bibliography and potential transcript list files. When the item becomes available, the card for it is transferred to the assignment file, following the corresponding card in that file. When the item has been completed, the "potential" card is transferred to the "final" bibliography or the "final" transcript list files, which represent completed work. The "potential" files should eventually disappear, if all the material to be looked for is found. Its cards gradually move into the assignment and final files.

Bibliography and transcript list cards on completed work are filed alphabetically in the "final" bibliography and "final" transcript list files. The transcript catalogue is arranged similarly. A card moved from the potential file follows the corresponding card in the final file. The final files will form a complete, annotated, and descriptive bibliography of northwestern Pennsylvania.

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IV. SUBJECT NOTES

1. Definition

A subject note is a note, memorandum, or record about a particular topic of investigation. It is the statement of one complete fact, idea, or opinion. "Large or small, simple or complex, no subject note should be made whose matter, or proposed matter, cannot be seen in terms of one point or theme." -- Dow, Principles of a Note System, p. 43.

2. Notetaking.

Information about all the various topics in the history of northwestern Pennsylvania is gathered from historical works, and recorded in the form of subject notes. A topical outline listing all the subjects or topics which must be investigated is given to each worker. No subject note card should be written, until it can be justified by a topic in the outline.

The worker reads the material assigned to him, and consults his topical outline from time to time, searching for information pertaining to the various topics of northwestern Pennsylvania history. When pertinent material is located, the first step is to separate it mentally into convenient units or ideas, which may be expressed in one or more sentences. Before writing the card quoting the material expressing the fact or idea, the worker must work out a suitable title for the note. Not until he can clearly sum up and express the meaning of the note in a brief title, will it be certain that a proper division has been made.

Carelessness in separating the units and in making the titles will result in the preparation of confused notes that have two or three subjects on a card.

3. The Form of Subject Notes.

Subject notes are written on 3 x 5 cards. The title of the note is written in the upper lefthand corner of the card. This should explain what the subject of the note is, and should also give the place and date of the event described. The origin of the note is given in the upper righthand corner. This tells from what book or other material the note was taken.

Below the title and origin, the actual note is quoted, using Q's instead of quotation marks, to avoid confusion with possible other quotation marks within the note itself. The note may be continued on the reverse of the card, or to a second card, if absolutely necessary.

When continuing to a second card, mark "1 of 2" in the upper center of the first card, and "2 of 2" on the second. The title and origin must be repeated on the second card.

When a subject note quotes material continuing from one page to another, the point where one page ends and another begins should be marked by inserting the new page number in brackets.

DIAGRAM

Title of note Origin of note Place - date Q Text or body of note, quoting the exact wording of the original,)adding necessary explanations in brackets(using Q's to show that the note has been quoted. Q

4. The Title.

The title of a subject note, written in the upper lefthand corner of the card, should be a very brief description of the contents of the card. First, as a keyword, the name of the most important person, place, or happening should be written; after this, brief particulars in two or three words should sum up what happened or what was done. Next, the subject should be located in both place and time, if this has not already been done in connection with the keyword.

The use of stilted language or of complicated efforts to follow an imaginary pattern should be avoided. There are no arbitrary rules about the making of a title, other than that it should sum up the subject or topic of the note, that a keyword should come first, and that date and place should be given. The following examples illustrate various possibilities:

Washington - arrival at Venango Dec. 1753

French Fort Presque Isle - built Summer, 1753

Baron de Longueuil - leads expedition by way of Lake Chautauqua, 1739

French and Indian War - Causes 1755-1763.

Colonel Henry Bouquet - builds fort at Presque Isle, July, 1760

Fort Niagara - Capture by English August, 1759.

Fort Niagara - significance of capture by English, August, 1759.

Sometimes no date or place can be given for notes giving definitions or general descriptions. Examples:

Anthropology - Definition

Ohio Valley - Climate

5. The Origin.

In the upper righthand corner of the card, sufficient information should be given to make it possible to find the original again. For the origin, give the author's last name, the title of the book or article, volume and page numbers, as well as footnote numbers, if the statement is taken from a footnote. If an article or other minor unit within a major unit, give also the name of the major unit. The titles of books should be underlined; the titles of articles should be given in quotation marks.

Abbreviate, when necessary, in writing the origin. The bibliographical files will have complete information about the book or article, as no work will be assigned in any material until a bibliographical card has been made for it.

6. Text of Subject Notes.

In the text or body of the subject note, quote the original sentence or sentences exactly, copying their punctuation, wording and spelling. If there are errors in the original, show that they are not yours by putting a star (*) above each error. Q's are used to mark the quotation of the note: quotation marks in the original should be copied exactly, as with other punctuation marks.

Make each note as brief as possible. Two or three sentences are usually enough to state or explain a fact. Remember the general rule that each subject note should represent the statement of one fact.

A subject note must be self-explanatory, must be a self-contained unit. Sometimes, a statement will not be clear when it is separated from the accompanying statements in the original text. Pronouns may refer back to previous statements, and no date may be given with the statement quoted. In some cases, this indefiniteness may be corrected by properly wording the title. Usually, it will be necessary to insert an explanation in brackets to clarify the meaning of the note. This explanation should be inserted in such a way that the statement will read smoothly. But if a worker inadvertently fails to insert a necessary explanation in the proper place, the card need not be re-written; an explanation may be written in brackets at the end of the note. Examples:

a. Preferable:

Q We [the French under Celoron] came to the junction of this river [the Allegheny] with the Brokenstraw. Q

b. Permissible:

Q We came to the junction of this river with the Brokenstraw. Q

[The French under Celoron on the Allegheny.]

7. Example of Subject Note.

The directions given must be followed exactly. The examples following will help to make them clear. In case of doubt on any point, the worker should consult his supervisor.

Title		Origin
Fort Venango - capture by Indians, June 18, 1763	Winsor, H. of America VI, 691, note 1	

Q Some years later, an Indian who was present [at the capture of Fort Venango, June 18, 1763] described the scene to Sir William Johnson. A party of Senecas gained admission to the fort by treachery, and murdered all the garrison except the commander, and him they later put to death by roasting over a slow fire. Q

Erie County uninhabited in 1795.	"Rees's Deposition, 1806." Sanford, Erie Co., 1894, p. 76.

Q In the year 1795, I went into the country and took a number of men with me. We kept in a body, as there appeared to be great danger, and continued so for that season. There was no work done of any consequence, nor was any person, to my knowledge, residing on any tract within my district. Q

French Canada - Weakness in 1760.	Northcliffe Collection, (Public Archives of Canada) p. 287

Q There were no French soldiers, outside of those occupied in the defence of Montreal, in the whole country east of Detroit, and all that remained anywhere were the few holding this post and two or three smaller posts still farther west. These remnants were so completely isolated that they could contribute no assistance to the main forces, and their fate depended upon the course of the events which were under the direction of Amherst. Q

Several points should be noticed about these examples. In the origins, the names of books have been considerably shortened to save space. In the first example, a Roman numeral shows the volume number, and an Arabic numeral the page, though "Vol." and "p." might be used. The word "note" means that the first subject note was taken from a footnote -- footnote number one on page 691.

In the second example, the subject note was made from a source printed in Laura G. Sanford, History of Erie County, 1894. The year of publication is shown to avoid confusion with an earlier edition. In the third example, The Northcliffe Collection was a report of the Public Archives of Canada.

8. Subject Notes including a Footnote.

Footnotes are often found in historical works or articles, where they are used either to cite other books or sources for information given in the text or body of the page, or to explain and comment upon the information above. When making notes, the nature of the footnote will dictate the use to be made of it. If the footnote is a reference to a book or article, a bibliography card or transcript card may be made. If the footnote contains information supplementary to the text, explaining some item in greater detail, it is suitable for a subject note. If it is very short, it may be "tacked on" to the subject note from the text. Otherwise, another subject note card may be made from the footnote, if it is pertinent material.

Do not go through the text making subject notes from the text alone, and leaving the footnotes for later work. Subject notes from the text, subject notes from explanatory footnotes, and bibliographical cards from bibliographical footnotes should be made in the order they are found.

The origin will read differently in case a footnote alone is quoted, from the way it reads if part of the text and a footnote is quoted.

In the first case:

Smith, H. of U.S.A.
II, p. 212, Note 1.

In the second case, "tacked on":

Smith, H. of U.S.A.
II, p. 212 and Note 1.

9. Checking.

Subject notes are checked in the same way as transcripts. The initials of the workers and the dates of work should be written on the reverse of the card. See sections 11 and 12 of chapter II for details.

10. Filing Subject Notes.

After the subject notes have been finished and checked by the research group, the filing department files them topically in an order determined by the filing topical outline. Related statements are brought close together in the file, so that the statement of various authorities can easily be compared.

Here is where the test comes as to the proper selection of material for subject notes. If a card actually has more than one topic on it, the filing department may find that it is impossible to file it, and may have to reject it, returning it to the research group for rewriting.

An index number is assigned to each subject note, based on its position in the file. The number is written in red ink in the upper center of the card. The position in the file is found by comparison with cards already on file, as well as by a study of the filing outline with its key numbers. Each card will be next to others of the same or similar topic.

For the index numbers, a system of letters and numbers is used, which allows the insertion of new material anywhere in the file, without changing the numbers previously assigned. If, for example, it is necessary to insert a card between cards numbered A-1 and A-2, the new card would be numbered A-1-A. One between A-1 and A-1-A would be A-1-a; one between A-1-a and A-1-A would be A-1-a-1; etc. There is, of course, a limit to the flexibility of this system. In practice, the filing department is careful to leave gaps between the numbers of the cards.

A cross-index keyed with the index numbers makes it possible to locate any name or place or date.

V. INDEXING

1. Transcript Index.

Transcript index cards are made by the filing department, for every person or place mentioned in a transcript. In the upper left-hand corner, the name of the person or place is written. If a person, the last name is written first. In the upper righthand corner, give the date. Below, in the "body" of the card, the author and title of the transcript is written. Series and folio information should be added for items from manuscript collections. In the lefthand margin appear the usual symbols for filing information.

Examples of transcript index cards:

Fort Pitt		Dec., 1760
TR PT	In: Gordon, "Present State of Fort Pitt and Posts Depending."	

Longueuil, Baron de		1739
SP	In: "Hocquart to Minister, Sept. 30, 1739." Arch. Nat., Colonies. C^{11} A 69, f. 236.	

Fort Le Boeuf		Feb., 1759
SP	In: "Mercer to Bouquet, Feb. 17, 1759." B. M., Add. MSS. 21644, f. 47.	

Cross-reference cards are used to eliminate needless duplication of work on the transcript index cards. Examples:

Pitt, Fort

See Fort Pitt

Wenango

See also Venango and Fort Venango.
See Fort Machault for French period.

Transcript index cards, with the cross-reference cards, are prepared in duplicate, and filed alphabetically according to names, and chronologically according to year, season, month and day.

2. Subject Note Index.

The subject note index is the cross-index to the subject note file. The index numbers of the subject note cards key these cards with index cards which serve to locate all the names of persons and places, and all the dates in the subject note file.

After the index number has been assigned to a subject note card, the filing department prepares an index card for every name or date mentioned in the note. The name or date is written in the upper lefthand corner; the index number is placed in the upper righthand corner. A brief description of the contents of the subject note is given below; this is usually similar to the title of the subject note.

Often, it is possible to prepare combined index cards for several subject notes, in which case all the numbers will be listed in the upper righthand corner. Cross-reference cards, similar to those used in the transcript index file, are also made.

The subject index is arranged alphabetically according to names, and chronologically by year, season, month and day.

Examples of subject index cards:

1754	H-700-d
French Fort Machault - location, strategic importance.	

For dates.

Fort Machault	H-700-d
Location of French fort, strategic importance.	

For names.

VI. GENERAL

1. Filing and Cataloguing Photographs.

Photographs are filed in the order of the literal symbols assigned to them when produced. The letters and titles are printed in ink on the back of the prints.

A photograph catalogue card has the title of the photograph in the upper lefthand corner, and the literal symbol in the right. A brief description is written below this. Prepared in duplicate, these catalogue cards are filed both alphabetically according to titles, and also in a topical arrangement. Cross-reference cards, similar to those in the transcript index, are also made.

Examples of photograph catalogue cards:

Corduroy logs on Old French Trail	FF
Remains of corduroy logs *in situ*, as excavated by archaeological workers of the Survey.	

Plan of Fort Machault	CR
Patterson and Hutchins' plan made in 1759. Photographed from a photostat in the Map Division of the Public Archives of Canada.	

2. Maps.

A large collection of photostatic copies of maps of historical importance has been gathered together. These maps are being redrawn by the draftsmen of the survey, in order to obtain clear, distinct and accurate reproductions. Some new maps are being created to embody various results of the Survey's work. These include a series of historical county maps.

The maps and the draftsmen's copies are arranged chronologically, with the earliest date first. A card catalogue of maps will be prepared, the form being the same as for photographs, except that the literal symbol is omitted. The card for each map will summarize all the available information about it.

3. Translation from the French.

Sources in French are transcribed like other sources, but with the help of the translators, to secure an accurate copy. But before a French document can be put in the regular transcript files, it must be translated into English.

The French transcript is first typed, with triple-spacing between the lines. A literal word-for-word translation is then written below each line of the typed copy. From this rough translation, a careful and polished translation is then written, exactly reproducing the thought of the original but avoiding stilted language. This final translation is then typed.

Before the translation can be transferred to the transcript files, it must be approved as good English by the editorial department.

Transcription, checking, typing, initialing, filing and cataloguing of French translations are the same as for ordinary transcripts, but they must be reported separately on the daily and monthly progress reports.

4. Identification of Names.

The preparation of a dictionary of the names of persons and places, and unusual words, occurring in connection with the history of early northwestern Pennsylvania is one of the objects of the Survey's work. The transcript index and subject note index supply the names to be identified. The searcher will look for all the information available about each name, using not only the Survey's files but dictionaries and other reference works as well. This identification file is of great value in the editing of sources for publication, and in ordinary historical writing.

All the information about a name should be summed up on one 3x5 card, reducing the available facts to the essentials. The form is very much like that of a subject note card. The name is written in the upper lefthand corner of the card. If a person, the last name is written first, and the years of birth and death are written immediately below the name. The origin of the information should be given in the upper righthand corner. The "identifying summary" is written in the body of the card and on the reverse. Q's are used only for material actually quoted.

For persons, this information should be included, if possible:

a. Date and place of birth; parentage.
b. Education and training.
c. Career; promotions, official positions, with dates.
d. Connection with important events.
e. Unusual facts.
f. Marriage, children.
g. Date and place of death.
h. If an Indian, derivation or meaning of name.

For names of places, this information should be sought:

a. Exact location.
b. Derivation, origin or meaning of name.
c. Connection with important events.
d. Note any changes in name.

For the names of tribes:

a. Derivation or meaning of name.
b. Geographic distribution, migrations.
c. Chief events in history of tribe.
d. Part of what major group? What minor groups within it?
e. Location of villages.

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VII. SYMBOLS AND ABBREVIATIONS.

To conserve space certain symbols and abbreviations are used, especially in transcript descriptions and bibliographical information. Many examples of their use will be found elsewhere in the manual.

Do not use abbreviations within quoted material except as used in the original. If it is necessary to insert anything within the quoted material, enclose it in square brackets.

Italics are represented in handwriting or typewriting by underlining.

When necessary to indicate that a wider space is required, use the symbols< >. For less space, use the symbols> <.

The omission of a word or words within a sentence or at its beginning is shown by a line of three dots, thus: ... A line of four dots shows omission at the end of a sentence.

Square brackets [ ] enclose material inserted, and doubtful words. If there are brackets in the original, show this by placing stars over the brackets, thus: *[ ]*

The following abbreviations will also be found useful:

TABLE

About (used with dates)	c.
Additional Manuscripts	Add. MSS.
Allegheny College Library	A. C. L.
Archives	Arch.
Assignment file	A.
Bates Historical Room	B. H. R.
Beaver	Be.
Bibliography, bibliographies	Bib.
Biography	Biog.
British Museum	B. M.
Butler	Bu.
Canada, Canadian	Can.
Carnegie Library of Pittsburgh	C. L. P.
Catalogue	cat.
Chapter	ch.
Clarion	Cl.
Clarion State Teachers' College	C. S. T. C.
Compiler	comp.
Copyright	©
County	Co.
Crawford	C.
Edition	Ed.
Editor	ed.
Erie	E.
Folio	f.
For example	e. g.
Forest	For.
Franklin	Fr.
History, historical	H.
Lawrence	Lw.
Library	L.
Library of Congress	L. C.
Manuscript, manuscripts	MSS.
Meadville	M.
Mercer	Mr.
New France	N. F.
Number	No.
Page, pages, shown by Arabic numerals or by:	p., pp.
Pennsylvania	Pa.
Pennsylvania State Library	P. S. L.
Photostatic or photographic copy	PT
Potential file	PO
Public	P.
Quotation: before and after quoted subject notes, use	Q.
Reference	Ref.
Revised	rev.
Special file of transcripts	SF.
Subject card	s. c.

Transcript	TR.
Transcript catalogue card	TC.
Transcript list card	Tls.
Translation	TL.
United States	U. S.
Venango	V.
Volume, shown by Roman numerals or by:	Vol.
Warren	W.

Other abbreviations may, of course, be introduced as occasion requires, but they must not conflict with these already in use.